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PowerSchool Special Programs Office Hours: Utilities

Tips for Case Management/Transfers

In this session we will ….

Take the time to learn/focus on two functions in Utilities:

• Case Management (Post-Migration)

• Transfers (Pre-/Post-Migration)

Zoom Meeting Norms

- Make sure that your audio is on mute during the presentation to limit background noise.

- If you have question that will benefit the entire group please ask. Those specific to your database please keep until we meet with you.

- Monitor your airtime both in the main room and breakout rooms. We have a limited amount of time and are trying to see as many clients as possible.

- Remember the goal of the Office Hours is to complete the tasks for the Topic of the Day and not every item on the audit.

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Administration > Utilities

Data Utilities: **Students** ▽

Select Utility: ▽

Data Utilities
Replace Student Fields
Deactivate Student Profiles
Delete Student Profiles
Reactivate Student Profiles
Restore Student Profile from Backup Database
Merge Student Profiles
Create Documents in Bulk
Convert File-Based Documents

Student Transfer Utilities
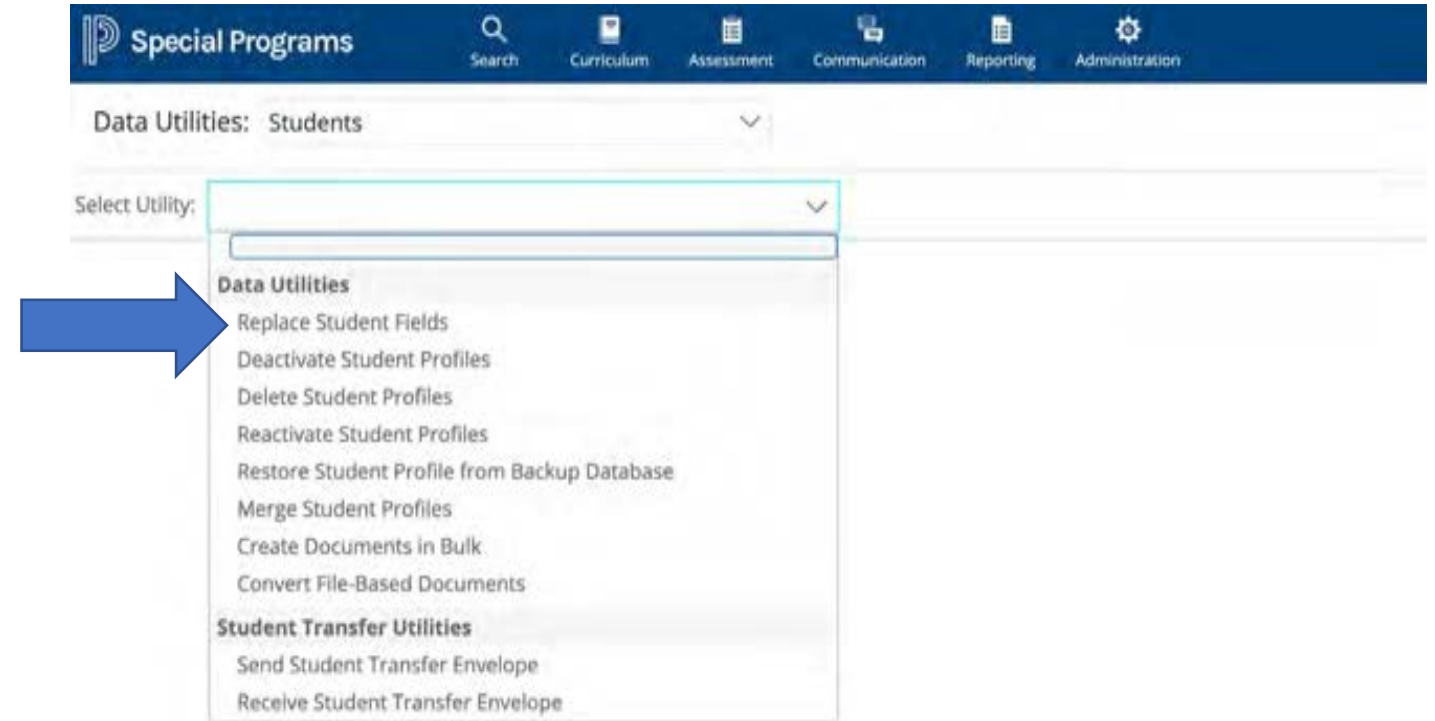Send Student Transfer Envelope
Receive Student Transfer Envelope

Utilities allows you to:
✓Replace student fields
✓Deactivate student profiles
✓Send student transfer envelopes
✓Receive Student Transfer Envelopes
And that's just a few of the functions in Utilities!

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Administration > Utilities > Replace Student Fields

Let's take a look at managing a caseload by mass assigning a case manager.

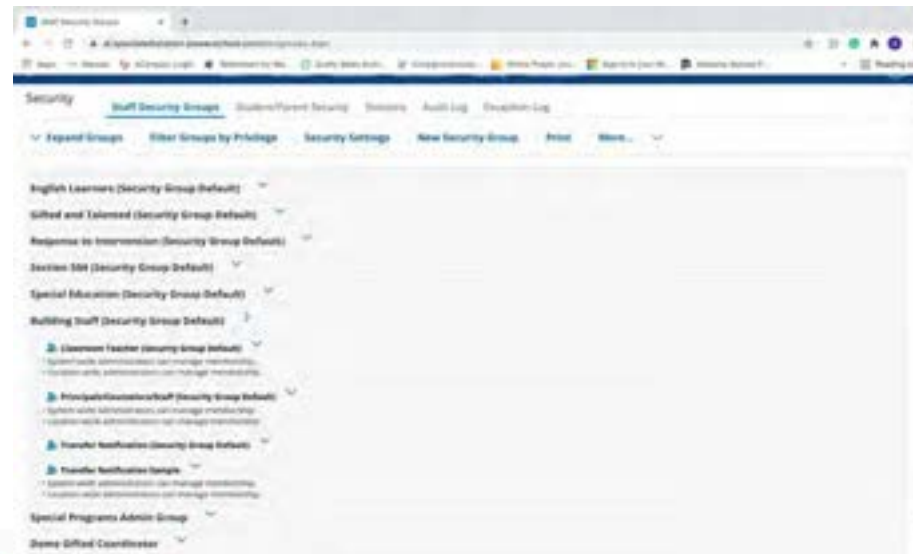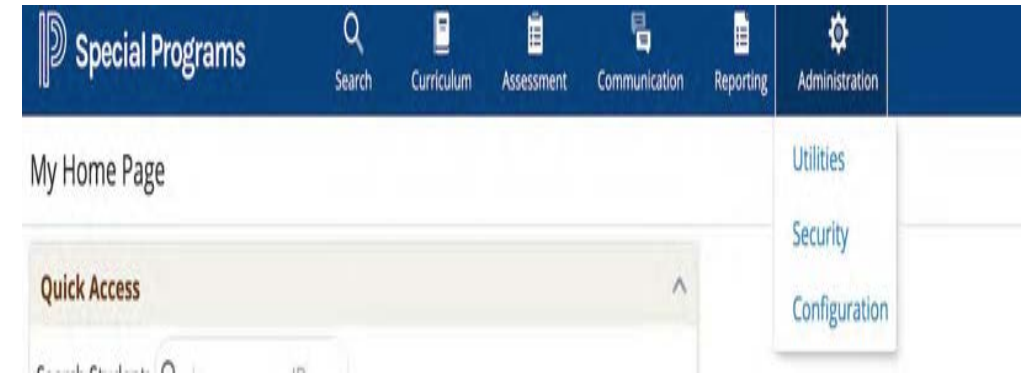# The Transfer Notification Process in Alabama

In PS SIS Student Transfers in/Served by Spec Programs → Sends Notification Message to Special Programs "Requester" → Imports student from General Table to Student Table → Requests Transfer Envelope → Receives Message requesting Transfer Envelope → Send Transfer Envelope → Receives Transfer Envelop (saves to Profile and Documents)

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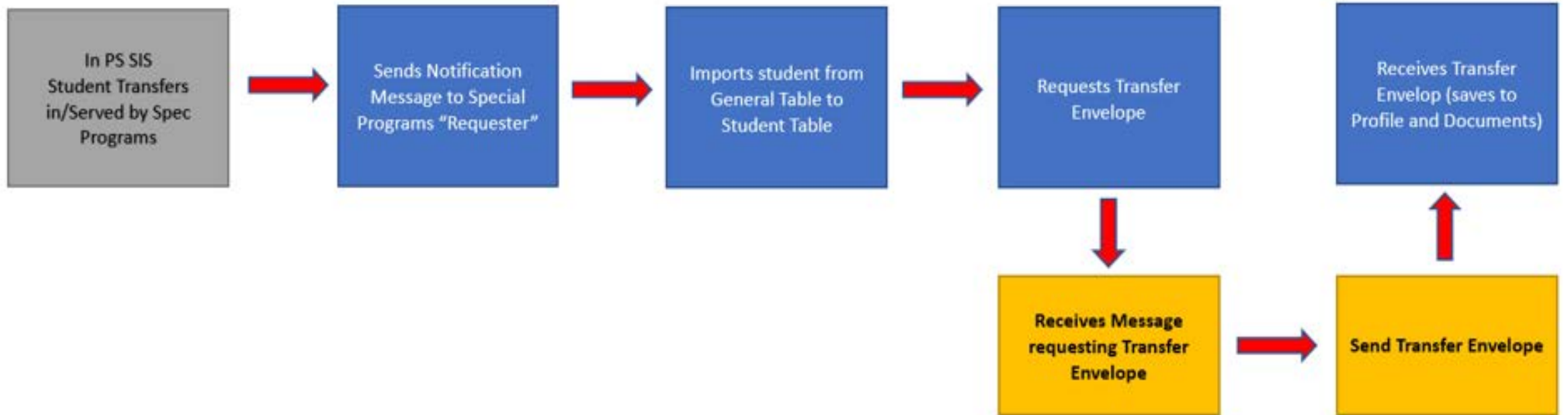
Administration > Utilities > Transfers

There is a process to Send and Receive Transfer Packages in Special Programs. A Requestor/Receiver needs to added as a member to your Transfers group.

Administration > Security

- Select Administration > Security
- Select Transfer Notification Security Group from the Drop-down Menu

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Select Document Templates

Add View Only Privileges to Documents

- Click on the Magnifying Glass for the document that you would like to add view only privileges for

- Select Edit > Check the box next to View > Save

For Transfer Notification Group*

Adding Members

Adding Members

- Look up faculty that you would like to add to the Transfer Security Group and select them.

- Save the selected Faculty Members.

Quick Search   Advanced Search

Staff Quick Search Form
Enter one or more fields and click the 'Search' button to find Staff with the same field information.

ID	Transfer1
Last Name	
First Name	
Works At	
	(ID) lookup
Alternate Staff Locations	
	(ID) lookup
Caseload	
	(ID) lookup

Search   Clear

Transfer Notification Sample > Members > Add Members Using: Quick Search | Advanced Search   >   Results

Add Staff Marked Below To 'Transfer Notification Sample'

	ID	Last Name	First Name	Works At	User Open ID[Admin]	User Open ID[Teacher]	User SSO ID	Prior Staff ID	Login (Temp Password)
☑	TRANSFER1	Requestor	Transfer						Activated

Add Staff Marked Above to Transfer Notification Sample

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Critical Pre-Migration Tasks

- Add members to your transfer group
- Modify Document Templates so that they are "VIEW ONLY" for transfer notification group

Risk: if you do not complete the tasks, you will delay migration

Benefit: when you complete tasks on time, you will receive your migration date

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Administration > Utilities

Resources:
- [Configuration, Basic Settings, Integration Overview](#)
- [Administrative Utilities Deep Dive](#)

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